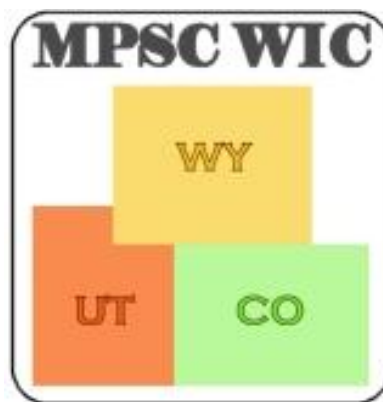

Mountain Plains States Consortium WIC System Project

DDI DELIVERABLE #07

SC 1 SCHEDULER – APPOINTMENTS SCREENS DFDD

(DETAILED FUNCTIONAL DESIGN DOCUMENT)

Presented to:



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1 Scheduler

The purpose of the Clinic Services Scheduler is to provide local agencies and clinics the ability to create and maintain various types of appointments for families in the WIC program. WIC appointments, Nutrition Education classes, Non-WIC appointments, and Personal Appointments appear on the clinic schedule.

The Master Schedule screens (accessed via System Administration) are used to set up the clinic's working hours and available staff. See the SA Scheduler Screens DFDD for more information on establishing the clinic working hours and staff.






2 WIC Clinic Schedule

The WIC Clinic Schedule screen displays all of the appointments for the clinic for the selected day or days.

The screenshot displays the 'Scheduler' application window. On the left is a calendar view for July, August, and September 2007. The main area is a grid showing appointments for Monday, July 30, 2007, from 8 AM to 12 PM Mountain time. The grid is organized by staff members: Suzy Smith, Jennifer Jenkins..., Ally Allwein, Barbara Braddock, Melinda Miller, and General. Appointments are color-coded: light blue for 'Open Cert Slot', orange for 'Works half day', light green for 'Breastfeeding Basics Scheduled 4 of 15', and light purple for 'Dentist Appointment'. Specific appointments include Wendy Hutchinson, Peterson, Pamela, Miller, Belinda, Kingsley, Ben, Anderson, Eloise, and Graham, Elsie.

Time	Suzy Smith	Jennifer Jenkins...	Ally Allwein	Barbara Braddock	Melinda Miller	General
8 AM						
9:00	Open Cert Slot	Open Cert Slot	Works half day	Wendy Hutchinson Cert - Hutchinson, Suzy HR Hutchinson, Cory	Peterson, Pamela Cert - Peterson, Pamela HR Peterson, Penny Peterson, Patsy	Breastfeeding Basics Scheduled 4 of 15
10:00	Open Cert Slot	Open Cert Slot		Miller, Belinda Recert - Miller	Dentist Appointment	
11:00	Open Cert Slot	Open Cert Slot		Kingsley, Ben Cert - Mallory, Ana		
12 PM	Open Cert Slot	Open Cert Slot		Anderson, Eloise Cert - Anderson, Eloise	Graham, Elsie	

Control	Description			
Calendars	Calendars appear in the Navigation pane. Multiple months of calendars are displayed. The number of calendars displayed depends on the user’s screen resolution setting. The current month is displayed at the top. Days with a master schedule for the selected clinic appear bolded. A blue shaded box indicates the currently selected day(s). A red outlined box indicates today’s date. The user can also navigate to other months by using the month spin control or the year spin control. A Today button is displayed below the last month to allow the user to easily jump to today’s date.			
	Type	Read-Only Data Grid		
	Display	Yes		
Clinic Schedule	The Clinic Schedule window displays all of the appointments for the selected day(s).			
	Type	Read-Only Data Grid		
	Display Only	Yes		
Time Ruler	The time ruler is displayed on the left side of the main panel. It shows the hours and minutes of the day. Each hour is broken down into time slots which can be adjusted by right clicking on the time bar and selecting a different interval from the context menu.			
	Format	Alphanumeric	Calculated	No
	Display Only	Yes		
(unlabeled) Visible Columns Selector	The Visible Columns Selector resides at the top of the main panel above the Schedule window. Clicking on the drop down arrow displays the list of columns that exist for the day selected. Next to each column name is a checkbox that can be used to show or hide the column in the Schedule window.			
	Type	List Box		
	Required	No		
	DB Column	NA		
	Code ID	MasterScheduleColumn table lookup		
Clinic Schedule Column Name	This is the designated name associated with the column. The column name can be a specific staff member’s name or a general heading such as CPA.			
	Format	Alphanumeric	Calculated	No
	DB Column	MasterScheduleColumn.DisplayText		

Control	Description			
Clinic Schedule Date	This is the date of the clinic schedule. The day of the week, month and numerical date are displayed. (Example: Monday, July 30)			
	Format	Day, Date	Calculated	No
	DB Column	MasterSchedule.MasterScheduleDt		
Displayed Columns Plus () Control	At the bottom right of the main panel are several buttons that control how many Clinic Schedule Columns are shown at one time without scrolling. The Plus control increases the number of Clinic Schedule Columns that are shown at one time without scrolling.			
	Type	Command Button		
	Hot Key	None		
Displayed Columns Minus () Control	At the bottom right of the main panel are several buttons that control how many Clinic Schedule Columns are shown at one time without scrolling. The Minus control decreases the number of Clinic Schedule Columns that are shown at one time without scrolling.			
	Type	Command Button		
	Hot Key	None		
Displayed Columns First () Control	At the bottom right of the main panel are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The First control scrolls the Clinic Schedule Columns so that the first column is displayed at the far left of the Schedule window.			
	Type	Command Button		
	Hot Key	None		
Displayed Columns Previous Page () Control	At the bottom right of the main panel are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Previous Page control scrolls the previous page of Clinic Schedule Columns into view.			
	Type	Command Button		
	Hot Key	None		
Displayed Columns Previous () Control	At the bottom right of the main panel are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Previous control scrolls the previous Clinic Schedule Column into view.			
	Type	Command Button		
	Hot Key	None		

Control	Description
Displayed Columns Next (▶) Control	At the bottom right of the main panel are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Next control scrolls the next Clinic Schedule Column into view.
	Type Command Button
	Hot Key None
Displayed Columns Next Page (▶▶) Control	At the bottom right of the main panel are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Next Page control scrolls the next page of Clinic Schedule Columns into view.
	Type Command Button
	Hot Key None
Displayed Columns Last (▶▶▶) Control	At the bottom right of the main panel are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Last control scrolls the Clinic Schedule Columns so that the last column is displayed at the far right of the Schedule window.
	Type Command Button
	Hot Key None

Business Rules

Navigation Panel Rules

1. Display a calendar in the navigation panel, defaulting to the current month and day. Display as many months at one time as the screen resolution allows.
2. Allow users to scroll forward and backward to view different months.
3. Allow users to choose a different month to view by clicking on the month spin control.
4. Allow users to view a different year by clicking on the year spin control.
5. Allow users to select a day or days in the calendar for which they wish to see the clinic schedule.
6. Display a Today button below the calendar that selects today's date.
7. Allow users to choose any number of contiguous days for which they wish to see the schedule by clicking on the first day, holding down the mouse button, and dragging the mouse to highlight the additional days.
8. Allow users to choose any number of non-contiguous days for which they wish to see the schedule, for example every Thursday, by clicking on a day, holding down the control key, and selecting any other days.

Main Panel Rules

9. Display a Clinic Schedule screen in the main panel which shows the schedule for the day or days selected on the navigation panel calendar. The Clinic Schedule consists of: a Time Ruler down the left side of the panel which indicates the time; one or more columns along the top of the pane which represent either staff people, intelligent columns which generally correspond to appointment types, or generic columns such as CPA 1, CPA 2 etc.; appointments which are represented as boxes at the intersection of

Business Rules

- the Time Ruler and columns.
10. The current time (based on computer's time) is indicated by a yellow circle and bar on the Time Ruler.
 11. The Clinic Schedule displays only the working hours for the day (plus one hour before and one hour after). The working hours run from the earliest time slot to the latest time slot set up on the Master Schedule.
 12. Clinic Closures are indicated by a read-only appointment for the duration of the closure that day. The read-only appointment contains text to indicate the reason for closure, either a Holiday name or the text "Clinic Closure".
 13. When a user clicks on a specific day on the navigation panel calendar, the Clinic Schedule defaults to the Clinic Schedule Begin time.
 14. Allow users to drag and drop appointments to any time or day shown in the Clinic Schedule screen.
 15. Allow users to resize appointments to increase or decrease the appointment start or end times
 16. When a user double clicks on an open space on the scheduler where no appointment or open slot currently exists a new appointment is created. A pop-up window opens first where an appointment type can be selected. The appropriate appointment editor then opens based on the appointment type selected.
 17. When a user resizes, moves or deletes an appointment, any "now open slots" are open and clear of color. The slots are not reset to the Master Template type.
 18. When a user copies or reschedules an appointment, all data fields except Date, Start Time, End Time, Column Name(s), and Status are copied for the new appointment.

Context Menu Rules

19. Right clicking anywhere on the Clinic Schedule that is not an appointment or the Time Ruler displays a context menu with the following options:
 - a. New Appointment – This brings up the Select Appointment Type pop-up where the user can select to create a new WIC Appointment, new Nutrition Education Class, new Non-WIC Appointment, or new Personal Appointment. The appropriate appointment editor then opens based on the appointment type selected.
 - b. Go To Today – This returns the user to Today's WIC Clinic Schedule
 - c. Go To Date – This allows the user to go to a date specified in the Go To Date pop-up.
20. A context menu appears when the user right-clicks on the Time Ruler. This context menu has items that allow the user to change the "resolution" of the divisions of minutes on the ruler to 5, 6, 10, 15, 30, or 60 minutes. The context menu divisions can be programmatically set to any number of minutes, if desired.
21. Right-clicking on a WIC Appointment with a date in the past or equal to today's date opens a context menu, giving the user the following options:
 - a. Open Appointment: Opens the WIC Appointment pop-up.
 - b. Open Family: Opens the family's record in Clinic Services.
 - c. Set Status: Options that the appointment status can be set to include: Arrived, Seen, No Show, Cancelled.
 - i. If a status of Cancelled is selected from the Set Status context menu item, capture a cancelled reason.

Business Rules

- d. Reschedule: Removes the original appointment from the schedule screen, changes the status of that appointment to Rescheduled, and allows the user to paste the appointment in another day/time and capture a rescheduled reason. The new appointment has no status.
 - e. Copy: Copies the appointment.
 - f. Delete: Deletes the appointment from the schedule.
 - g. English Language Printouts: Notice of Missed Appointment - English
 - h. Spanish Language Printouts: Notice of Missed Appointment - Spanish.
- 22. Right-clicking on a WIC Appointment with a future date opens a context menu, giving the user the following options:
 - a. Open Appointment: Opens the WIC Appointment pop-up.
 - b. Open Family: Opens the family's record in Clinic Services.
 - c. Set Status: Options that the appointment status can be set to include: Cancelled.
 - i. If a status of Cancelled is selected from the Set Status context menu item, capture a cancelled reason.
 - d. Reschedule: Removes the original appointment from the schedule screen, changes the status of that appointment to Rescheduled, and allows the user to paste the appointment in another day/time and capture a rescheduled reason. The new appointment has no status.
 - e. Copy: Copies the appointment.
 - f. Delete: Deletes the appointment from the schedule.
 - g. English Language Printouts: Appointment Reminder - English
 - h. Spanish Language Printouts: Appointment Reminder - Spanish.
- 23. Right-clicking on a Non-WIC Appointment opens a context menu, giving the user the following options:
 - a. Open Appointment: Opens the Non-WIC Appointment pop-up.
 - b. Copy: Copies the appointment.
 - c. Delete: Deletes the appointment from the schedule.
- 24. Right-clicking on a Personal Appointment opens a context menu, giving the user the following options:
 - a. Open Appointment: Opens the Personal Appointment pop-up.
 - b. Copy: Copies the appointment.
 - c. Delete: Deletes the appointment from the schedule.
- 25. Right-clicking on a Nutrition Education Class Appointment with a date in the past opens a context menu, giving the user the following options:
 - a. Open Class: Opens the Nutrition Education Class pop-up.
 - b. Copy: Copies the appointment.
 - c. Nutrition Ed Roster: Prints the Nutrition Education Class Roster.
- 26. Right-clicking on a Nutrition Education Class Appointment with a date equal to today's date opens a context menu, giving the user the following options:
 - a. Open Class: Opens the Nutrition Education Class pop-up.
 - b. Copy: Copies the appointment.

Business Rules

- c. Delete: Deletes the appointment from the schedule.
 - d. Nutrition Ed Roster: Prints the Nutrition Education Class Roster.
27. Right-clicking on a Nutrition Education Class Appointment with a date in the future opens a context menu, giving the user the following options:
- a. Open Class: Opens the Nutrition Education Class pop-up.
 - b. Copy: Copies the appointment.
 - c. Delete: Deletes the appointment from the schedule.
 - d. Appointment Reminder: Prints the Nutrition Education Class Appointment Reminder.
 - e. Nutrition Ed Roster: Prints the Nutrition Education Class Roster.
28. After a right-click copy or reschedule, a second right-click brings up another context menu giving the user the following options:
- a. New WIC Appointment: Creates a new WIC appointment. This is unrelated to the appointment that the user just requested to be copied or rescheduled.
 - b. New Nutrition Education Class: Creates a new Nutrition Education Class Appointment. This is unrelated to the appointment that the user just requested to be copied or rescheduled.
 - c. New Non-WIC Appointment: Creates a new Non-WIC Appointment. This is unrelated to the appointment that the user just requested to be copied or reschedule.
 - d. New Personal Appointment: Creates a new Personal Appointment. This is unrelated to the appointment that the user just requested to be copied or reschedule.
 - e. Paste: Available if an appointment has been placed to the clipboard from a Copy or a Reschedule. Pastes an identical appointment to a new date and/or time.
29. Mass Rescheduling is accomplished by right-clicking on a specific column name which opens a context menu, giving the user the following options:
- Move Column
 - Paste Column
- The user clicks on Move Column and goes to the day that they want the column to be pasted to. On the target date, the user places the cursor to the right of the furthest right column and right-clicks and a context menu is displayed. At that point the user selects Paste Column. The column is cut from the current day. A new Master Schedule is created for that column for the selected target day. The new column is "<Column Name>-Moved". The status of all appointments within the column is set to Mass Reschedule.

Display of Appointments

30. Color code appointment boxes with the following:
- a. All open hours in columns are smoky white.
 - b. Before/after hours are light gray.
 - c. Individual columns are NOT colored.
 - d. Appointment types are colored as follows on the schedule:
 - i. Nutrition Education Class = Pale Green

Business Rules

- ii. Non-WIC Appointment = Pink
 - iii. Personal Appointment = Burly Wood
 - iv. WIC Appointment – Certification = Pale Turquoise
 - v. WIC Appointment – Recertification = Light Steel Blue
 - vi. WIC Appointment – State defined <WICApptTypeCd> = Peach Puff
 - vii. WIC Appointment - State defined <WICApptTypeCd > = Wheat
 - viii. WIC Appointment - State defined <WICApptTypeCd > = Khaki
 - ix. WIC Appointment - State defined <WICApptTypeCd > = Linen
 - x. WIC Appointment - State defined <WICApptTypeCd > = Thistle
 - xi. If more WIC appointment types are defined than colors are defined, then the next appointment type would take on the next color in the color loop. (The colors would start to be reused.)
- e. Column Labels and Time Bar Label are in bold text.
31. Display a thin strip along the left side of each appointment box to indicate the appointments status.
32. As appointment statuses are changed, the colors of the tabs on the appointments on the screen are changed. (Appointment statuses are only updated on WIC appointments. All other types of appointments will show No Status=White.)
- a. No Status = White
 - a. No Show = Red
 - b. Arrived = Yellow
 - c. Seen = Green.

Text for Appointment Rules

33. The text shown on the WIC Calendar for a WIC Appointment includes as much of the following text as can display in the appointment time selected:
- Endorser Last Name, Endorser First Name
 - Abbreviated WIC Appointment Type code – Participant Last Name, Participant First Name, Indicators HR, IN, SN, and MC as needed.
 - (additional participants listed below displaying the data fields described above that are pertinent to that specific participant)
34. The text shown on the WIC Calendar for a Non-WIC Appointment includes as much of the following text as can display in the appointment time selected:
- Subject of appointment
35. The text shown on the WIC Calendar for a Personal Appointment includes as much of the following text as can display in the appointment time selected:
- Subject of appointment
36. The text shown on the WIC Calendar for a Nutrition Education Class Appointment includes as much of the following text as will display in the appointment time selected:
- Name of class
 - Scheduled # of # (where the first # is Scheduled Count and the second # is the Current Max Count).
37. Hover text appears when the cursor is placed over a WIC appointment. The hover text displays: Endorser Last Name, Endorser First Name, Abbreviated WIC Appointment

Business Rules

Type, Participant Last Name, Participant First Name, Indicators (HR for High Risk, IN for Interpreter Needed, SN for Special Needs, and MC for Miscarriage,), and family phone number (display as (999) 999-9999).

- 38. Hover text appears when the cursor is placed over a Nutrition Education Appointment. The hover text displays: Class name, topics, and notes.
- 39. Hover text appears when the cursor is placed over a Non-WIC Appointment. The hover text displays: Subject and notes.
- 40. Hover text appears when the cursor is placed over a Personal Appointment. The hover text displays: Subject and notes.

General Business Rules

- 41. When a user clicks on a specific appointment on the Clinic Services Appointment history screen, and then comes to the scheduler, that appointment is placed in the upper-left corner of the Clinic Schedule.
- 42. Cancelled appointments are saved but are not shown on the schedule. (All appointments, past and future, regardless of status are displayed on the Appointment History screen.)
- 43. Double-clicking on an appointment allows the user to open that appointment. The appointment is opened in a pop-up window which varies according to the appointment type. See the following sections of this DFDD for details.
- 44. If an appointment is entered in an intelligent column, display a warning if the appointment's type does not match the intelligent column's designated appointment type. Display a warning if at least one participant's WIC appointment type does not match the intelligent column's appointment type.
- 45. If an appointment is saved and the person is new to WIC, then their WIC status is changed to Pending and an application is created for them.
- 46. If an appointment is saved for a WIC participant (member has a WIC Status) and the WIC Status = Terminated or Ineligible then their status is changed to Pending and an application is created for them.

Developer Notes

- 1. The clinic start time is stored in ClinicSchedule.StartTimeDt. The end time is stored in ClinicSchedule.EndTimeDt.
- 2. To allow for additional appointments within a duration area, the appointment display cannot fill the entire column width. Users must be able to click into the duration area within the column to add additional appointments.
- 3. As additional appointments are added to a column, they are resized so that all of the scheduled appointments fit within the column width.
- 4. Right-clicking on the time bar opens a context menu, giving the user the option to change the time interval and customize the time ruler's label, time zone, current time, and whether to use daylight savings time or not.
- 5. When an appointment is rescheduled, a copy is made of the original appointment, given a status of rescheduled, and the original appointment is no longer shown on the schedule. The original appointment record then has a link to the copy populated for the purpose of appointment history.

Developer Notes

6. When an appointment is rescheduled, a copy of the original record is kept in the database, but hidden in the schedule. If the column has been assigned an appointment type, then the new appointment is given that appointment type; otherwise, it is given the appointment type of the rescheduled appointment.

3 WIC Appointment

The WIC Appointment pop-up is used to create or edit a WIC Appointment. The pop-up allows the user to define what family the appointment is for, define the appointment time and duration and appointment type, and indicate whether the appointment was a walk-in or exceeded processing standards. Family preferences are displayed. Within the data grid, the appointment type can be selected for each person in the family.

WIC Appointment

Subject: Dill, Stephanie Cert-Dill, Stephanie, HR Recert-Dill *Column Name(s) Certification, Staff Person 1

*Date 8/17/2007 *Status Arrived

*Start Time 10:00 AM Appointment Type Certification

*End Time 10:45 AM 45 minutes

Walk-in ☐

Processing Standards ☐ Exceeded Reason

Notes

Select Recent Family Dill, Stephanie Find Family Family ID Search Retrieve Family

Family ID: 20418 Endorser: Dill, Stephanie

Preferences [Change](#)

Language: English Time of Day ☐ AM ☒ PM Column: Staff Person 1 Day of Week: Monday

Participants

	Name	Category	WIC Status	Cert. End Date	Blood Work Due	Appt. Type	Indicators
	Dill, Stephanie	Breastfeeding	Active	8/19/2007		Certification	HR
	Dill, Baby	Infant	Active	8/9/2007		Recertification	
▶▶							

OK Cancel Delete

Control	Description			
Subject	This displays the subject of the appointment. The text for a WIC Appointment includes the following information: Endorser Last Name, Endorser First Name Abbreviated WIC Appointment Type code – Participant Last Name, Participant First Name, Indicators HR, IN, SN and MC as needed. (additional participants listed below)			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	Appointment.Subject		
Date	This is the Date of the appointment.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	Appointment.StartTime		
Start Time	This is the Start Time of the appointment. Start times can be adjusted in increments of 5 minutes.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.StartTime		
End Time	This is the End Time and duration of the appointment. The End Time defaults to the clinic appointment duration length (defined in System Administration). This can be adjusted by the user if more or less time is needed for the specific family. End times can be adjusted in increments of 5 minutes.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.EndTime		

Control	Description			
Unlabeled (next to End Time)	This is the appointment duration, that is, the difference between the start and end times for the appointment. The text is red if the appointment duration is less than the appointment duration defined in System Administration for the WIC Appointment Type.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 99 minutes		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Walk-in	The user selects the Walk-in check box when an appointment is a walk-in (not previously scheduled).			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	Appointment.WalkInIn		
Processing Standards-Exceeded	Processing standards apply only to applicants to the WIC program. When the processing standards are exceeded, the system marks this check box. The Reason field is then required. See Processing Standards in the SA Scheduler Screens DFDD for more information.			
	Type	Check Box		
	Display Only	Yes	Calculated	No
	DB Column	Appointment.ExceedProcStandardIn		
Processing Standards-Reason	This list displays reasons why a processing standard is exceeded. This is a state determined list that may include client preference, staffing, etc. A reason must be supplied before an appointment that is outside the processing standard timeframes can be saved.			
	Type	List Box		
	Required	Yes, if Processing Standards-Exceeded is checked		
	DB Column	Appointment.ProcStandardReason		
	Code ID	Time Exceeded Reason		

Control	Description			
Notes	This is a free form text box which allows users to record comments about the appointment. Clicking on the down arrow opens up a larger area for typing. Special Needs text recorded on the Family Member screen in Clinic Services is automatically copied into the Notes.			
	Type	Multi Line Text Box		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	Appointment.Note		
Column Name(s)	This is the designated name(s) for the column(s) associated with the appointment. The column names are created on the Master Schedule screen in System Administration. The column name may be a specific staff member’s name, a general heading such as CPA, or an intelligent column name like Certification. Clicking on the down arrow opens a listing of column names. The user can check multiple check boxes to put this appointment in more than one column.			
	Type	Text Box		
	Required	Yes		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	AppointmentColumn.MSC_ID		
Status	This is the Status of the appointment. When a new appointment is created, there is no default value selected.			
	Type	List Box		
	Required	Yes		
	DB Column	Appointment.AppointmentStatusCd		
	Code ID	Appointment Status This code element is non-editable. The installed values are: No Show Arrived Seen Cancelled Rescheduled Mass Rescheduled		

Control	Description	
Appointment Type	This read-only field is the Type designation of the WIC appointment. The WIC appointment type that was selected when the new WIC appointment was first created is the default value. Additionally, when an appointment is saved, the system evaluates the participant appointment types to determine the Appointment Status.	
	Type	List Box
	Required	No
	DB Column	Appointment.AppointmentTypeCd
	Code ID	WICAppointmentTypeCd This code element is editable but these installed values are non-editable: Certification Recertification
Select Recent Family	The Select Recent Family list box allows the user to pick the family they want to schedule an appointment for from the list of families recently accessed in Clinic Services. When a family is selected the family's information is retrieved and the family is associated with the appointment. If the desired family is not in the recent family list then the user should use either the Select Family ID or Family search functions described below.	
	Type	List Box
	Required	No
	DB Column	NA
	Code ID	NA – List of recently viewed families is held in memory
Find Family	The Find Family button opens the search pop-up, allowing the user to search for the family that they want to schedule an appointment for. If they select a family and press the OK button, that family's data is shown on the WIC Appointment pop-up and the family is associated with the appointment. See Searching for Families for additional information.	
	Type	Command Button
	Hot Key	Alt + I

Control	Description			
Family ID Search	The Family ID Search text box allows the user to enter the ID of a family that they want to schedule the appointment for. When they press the Retrieve Family button the family’s information is retrieved and the family is associated with the appointment. If the ID is invalid, an error is displayed. If the user does not know the family’s ID, then they should use the Find Family button.			
	Type	Text Box		
	Required	No		
	Length	9		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	Appointment.BFam_ID		
Retrieve Family	The Retrieve Family button retrieves family information for the family ID entered into the Family ID Search text box and associates that family to the appointment. If the ID is invalid, an error is displayed.			
	Type	Command Button		
	Hot Key	Alt + V		
Family ID	This is the Family ID for the family associated with the appointment.			
	Type	Text Box		
	Required	No		
	Length	9		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	Appointment.BFam_ID		

Control	Description			
Endorser	This is the name of the endorser of the family with an appointment.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	FamilyMember.FirstName, FamilyMember.MiddleName, FamilyMember.LastName, FamilyMember.LastNameSuffix Where FamilyMember.ParentGuardianIn = "Y"		
Unlabeled	Abbreviations that alert users that this endorser: is High Risk based on nutritional factors, has special needs, needs an interpreter, or that the most recent pregnancy ended in a miscarriage. Below are the abbreviations that are displayed and what they stand for. Hover text provides additional information about the indicators. HR = High Risk SN = Special Needs IN = Interpreter needed MC = Miscarriage			
	Type	Text Box		
	Required	Yes, if any of these indicators are set for the endorser		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	RiskHeader.HighRiskIn FamilyMember.SpecialNeeds + BenefitFamily.NeedInterpreterIn + Participant.MiscarriageIn		
Family Preferences - Change	The Change button opens the Family Preferences pop-up screen to allow the family preferences to be changed. This button is only enabled if a family has been chosen.			
	Type	Command Button		
	Hot Key	None		

Control	Description			
Family Preferences - Language	This displays the Preferred Spoken Language of the family.			
	Type	Text Box		
	Required	Yes, if a Preferred Spoken Language is selected		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	BenefitFamily.SpokenLanguageCd		
Family Preferences - Time of Day - AM	This displays the selected time of day preference.			
	Type	Radio Button, display only		
	Required	Yes, if Time of Day-AM selection has been made		
	DB Column	BenefitFamily.PreferredAppointmentTimeCd		
Family Preferences - Time of Day - PM	This displays the selected time of day preference.			
	Type	Radio Button, display only		
	Required	Yes, if Time of Day-PM selection has been made		
	DB Column	BenefitFamily.PreferredAppointmentTimeCd		
Family Preferences - Column	This displays the selected column name preference.			
	Type	Text Box		
	Required	Yes, if column preference selected		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	BenefitFamily.PreferredStaffPerson		

Control	Description			
Family Preferences – Day of Week	This displays the selected day of week preference.			
	Type	Text Box		
	Required	Yes, if day of week preference selected		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	BenefitFamily.PreferredAppointmentDayCd		
Participants	This is a grid containing a list of Participants in the family.			
	Type	Data Grid		
Participants - Name	This display-only column contains the names of all participants (members with a WIC status) in the family.			
	Format	Alphanumeric, display First name + Last name	Calculated	No
	DB Column	AppointmentParticipant.Part_ID		
Participants - Category	This display-only column for women indicates the current participant category, if active, or the last participant category for this participant while the participant was active. This display-only column for infants/children indicates the current participant category based on age.			
	Format	Alphanumeric	Calculated	No
	DB Column	ParticipantType.ParticipantTypeCD		
Participants - WIC Status	This display-only column indicates the current WIC status for this participant.			
	Format	Alphanumeric	Calculated	No
	DB Column	ParticipantStatus.WICStatusCd		
Participants - Cert. End Date	This display-only column contains the most recent Certification End Date for the participant.			
	Format	Formatted Date, MM/DD/YYYY	Calculated	No
	DB Column	Certification.EndDt		

Control	Description			
Participants - Blood Work Due	This display-only column contains the date that blood work is next due for the participant. See business rules for further details. When the date is before the appointment date, the font is Red (indicating overdue). When the date is after or on the appointment date, the font is Black.			
	Format	Formatted Date, MM/YYYY – MM/YYYY	Calculated	Yes
	DB Column	BloodWork.CollectionDt		
Participants - Appt. Type	The user selects the type of WIC appointment for which the participant is coming to the clinic.			
	Type	List Box		
	Required	No. At least one of the participants listed must have an appointment type selected. If a participant is not being seen at the appointment, this is left blank.		
	DB Column	AppointmentParticipant.AppointmentTypeCd		
	Code ID	WICAppointmentType This code element is editable but these installed values are non-editable: Certification Recertification		

Control	Description			
Participants - Indicators	Abbreviations that alert users that this participant: is eligible for Farmers’ Market checks, is a foster child, is High Risk based on nutritional factors, has special needs, needs an interpreter, has breastfeeding equipment that is to be returned to the agency, needs blood taken to meet periodicity timeframes, or that the most recent pregnancy ended in a miscarriage. Below are the abbreviations that are displayed and what they stand for. Hover text provides additional information about the indicators. Unless otherwise noted, the hover text for any abbreviation is what it stands for. HR = High Risk SN = Special Needs IN = Interpreter needed MC = Miscarriage FM = Farmers Market Eligible Foster = Foster Child BP = Breast Pump. An actual BF Equipment Item name is shown as hover text BW = Blood Work. The actual Blood Work Due date range is shown as hover text			
	Type	Text Box		
	Required	Yes, if any indicators are set for the participant		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	Participant.FMEligibleIN, RiskHeader.HighRiskIn, Participant.FosterChildIn, SerializedInventoryItemHistory.DueDt, FamilyMember.specialneeds, BenefitFamily.NeedInterpreterIn bloodwork.CollectionDt Participant.miscarriagein		
OK	For a new appointment, the OK button saves the WIC Appointment to the clinic schedule. For an existing appointment, the OK button saves any changes to the appointment.			
	Type	Command Button		
	Hot Key	Alt + O		

Control	Description	
Cancel	For a new appointment, the Cancel button closes the appointment pop-up without saving the appointment to the schedule. For an existing appointment, the Cancel button closes the appointment pop-up and abandons the changes to the appointment. The user is returned to the WIC Clinic Schedule.	
	Type	Command Button
	Hot Key	Alt + L
Delete	The Delete button allows the user to delete the WIC Appointment from the clinic schedule.	
	Type	Command Button
	Hot Key	None

Business Rules

General Business Rules

1. Display as much of the subject field information as possible in the text box. Allow user to scroll to see any additional information.
2. Start time must always precede end time.
3. Enable the Reason list box if Exceeded checkbox is marked.
4. Display an error if trying to schedule an appointment outside of the clinic operating hours plus 1 hour before or 1 hour after.
5. Display an error message if the processing standard timeframe is exceeded and a reason is not selected.
6. Display a warning if a family is already associated with the appointment and the user begins to select a new family from any of the three methods supplied.
7. If the Special Needs text box on any family member's screen contains information, place that text into the Notes area. If there is data from multiple family members, list on separate lines.
8. Allow an appointment to be associated with more than one column. If the Master Schedule is set up to contain both intelligent columns, which correspond to appointment types, and columns that represent staff people, then allow an appointment to be associated to more than one column to allow for visualizing staff utilization and appointment type mix.
9. For reporting purposes, the appointment Status is assumed the same for all scheduled participants in the WIC appointment.
10. If the appointment status is set to Cancelled capture a cancelled reason.
11. Set the Appointment Type field based on the Participant Appointment Type selections made in the Participants data grid.
 - a. If the appointment types selected for all the participants are the same, then set the overall Appointment Type to that type.
 - b. If the appointment types selected for the participants differ and there is at least one marked as "Certification", then set the overall Appointment Type to "Certification".
 - c. If the appointment types selected for the participants differ and there is at least one marked as "Recertification" and there were none set to

Business Rules

Certification, then set the overall Appointment Type to "Recertification."

- d. If the appointment types selected for the participants differ and non are Certification or Recertification, then set the overall Appointment Type to the first appointment type marked in the grid.

12. Only applicants/participants with a current application can have an appointment type assigned to them.
13. Display an error if the user is trying to save an appointment and no WIC Appointment Type has been selected for any participant.
14. Display a warning if a family is not associated with the appointment and the OK button is pressed.
15. Display a message to confirm deleting an appointment.

Indicator Business Rules

16. Display the High Risk (HR) indicator in red font.
17. Display the Breastfeeding (BP) equipment indicator in red font if today's date is greater than the Expected Return Date and the Returned Date field is not completed.
18. Provide hover text for the endorser indicators:
 IN = Interpreter needed: <Preferred Spoken Language>
 HR = High Risk
 SN = Special Needs
 MC = Miscarriage
19. Display an error if the user enters an invalid Family ID into the Family ID Search text box and presses the Retrieve Family button.
20. The system parameter, ClinicServices.UseFarmersMarket, determines whether or not the FM indicator is displayed.

Blood Work Due Rules

21. Blood Work Due Ranges:

Infants

Age	Activity	Blood Work Due Range
Less than 7 months	Pending, Initial Certification appointment scheduled	(DOB + 9 months) to (DOB + 12 months)
7 months and older	Pending, Initial Certification appointment scheduled	Appt Date to (Appt Date+90 Days)
Less than 7 months	Not Pending, Certified	(DOB + 9 months) to (DOB + 12 months)
7 months and older	Not Pending, Certified and Hgb/Hct recorded	(Measurement date of Hgb/Hct + 6 months) to (DOB + 18 months)
7 months and older	Not Pending, Certified and Hgb/Hct not recorded	Appt Date to (Appt Date+90 Days)

Child

Business Rules			
	Age	Record indicates	Blood Work Due Range
	12-18 months	Hgb/Hct values exist and measurement date is <6 months old	(DOB + 15 months) to (DOB + 18 months)
	19-23 months	Hgb/Hct values exist and measurement date is <6 months old	(Measurement Date + 6 months) to (Measurement Date + 9 months)
	12-23 months	Hgb/Hct values exist and measurement date ≥6 months old	Appt Date to (Appt Date+90 Days)
	12-23 months	No Hgb/Hct values exist	Appt Date to (Appt Date+90 Days)
	24-60 months	Last Hgb/Hct value within normal range	(Measurement Date + 9 months) to (Measurement Date + 12 months)
	24-60 months	Last Hgb/Hct value not within normal range	(Measurement Date + 6 months) to (Measurement Date + 9 months)
	24-60 months	No Hgb/Hct values in last 12 months	Appt Date to (Appt Date+90 Days)

Pregnant Women

- If Pregnant woman, blood work due date = Appt. Date to (Appt Date+90 Days).

Breastfeeding Women

- If Breastfeeding woman <6 weeks post partum and no Hct/Hgb for BF status in record, blood work due date = (ADD + 6 weeks) to (Appt Date+90 Days). (This field remains blank until the ADD information is completed.)
- If Breastfeeding woman ≥6 weeks post partum and no Hct/Hgb for BF status in record, blood work due date = Appt Date to (Appt Date+90 Days).

Not Breastfeeding Women

- If Not Breastfeeding woman <6 weeks post partum and no Hct/Hgb for BF or postpartum status in record, blood work due date = (ADD + 6 weeks) to (Appt Date+90 Days). (This field remains blank until the ADD information is completed.)
- If Not Breastfeeding woman ≥6 weeks post partum and no Hct/Hgb for BF or postpartum status in record, blood work due date = Appt Date to (Appt Date+90 Days).

Developer Notes

1. Perform an automatic refresh when saving a new appointment.
2. Appointment date minus application date is used to determine adherence to processing standards timeframes. See Processing Standards in the SA Scheduler Screens DFDD for more information.

Developer Notes

3. When a family is selected, pull the Special Needs text recorded on the Family Member screen in Clinic Services into the Notes field.

System Parameter	Purpose	Format
ClinicServices.UseFarmersMarket	Indicates if the state is managing a WIC Farmers' Market Nutrition Program through this application. If "Yes" then the Farmers' Market screens and indicators are available to the user. This also allows the FMNP Check Number search criterion and FM indicator to be displayed. Must be set to "Yes" or "No." If a valid value is not found, "No" will be used as the assumed value.	Character

3.1 Searching for Families

The clinic services search screen is used to search for families to set up an appointment. Users can access this screen by clicking on the Find Family button on the WIC Appointment pop-up. After selecting any participant of a family in the search results, all the participants of that family are placed into the Participants section of the WIC Appointment pop-up. The same clinic services screen is described in the CS 2 Activity Screens DFDD. See the section on Retrieve Participants in that DFDD.

3.2 Family Preferences

The Family Preferences pop-up allows editing of the family appointment preferences. Family Preferences can be recorded and used to help staff find an appropriate appointment time in the future. The Family Preferences are displayed on the WIC appointment pop-up. The Family Preferences pop-up is accessed by clicking the Change button on the WIC appointment pop-up.



The image shows a 'Family Preferences' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog is divided into two main sections. The top section contains two labels: 'Family ID:' and 'Endorser:'. Below this is a section titled 'Preferences' which is enclosed in a white box with a thin border. Inside the 'Preferences' box, there are three settings: 'Language:' (with a text input field), 'Time of Day' (with two radio buttons labeled 'AM' and 'PM'), 'Column' (with a dropdown menu), and 'Day of Week' (with a dropdown menu). At the bottom of the dialog, outside the 'Preferences' box, are two buttons: 'OK' and 'Cancel'.

Family ID: Endorser:

Preferences

Language:

Time of Day ☐ AM ☐ PM

Column

Day of Week

OK Cancel

Control	Description			
Family ID	This is the Family ID for the Family with the appointment.			
	Type	Text Box		
	Required	No		
	Length	9		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	Appointment.BFam_ID		
Endorser	This is the name of the endorser of the family with the appointment.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	FamilyMember.FirstName, FamilyMember.MiddleName, FamilyMember.LastName, FamilyMember.LastNameSuffix Where FamilyMember.ParentGuardianIn = "Y"		
Family Preferences - Language	If a Preferred Spoken Language has been selected, it is displayed in the text box.			
	Type	Text Box		
	Required	Yes, if Preferred Spoken Language selected		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	BenefitFamily.SpokenLanguageCd		
Family Preferences - Time of Day - AM	The user selects the Time of Day – AM radio button when this is a family preference of appointment times. AM is all appointment times within the Master Schedule starting prior to noon.			
	Type	Radio Button		
	Required	No		
	DB Column	BenefitFamily.PreferredAppointmentTimeCd		

Control	Description	
Family Preferences - Time of Day - PM	The user selects the Time of Day – PM radio button when this is a family preference of appointment times. PM is all appointment times within the Master Schedule starting after noon until the end of the clinic operating hours.	
	Type	Radio Button
	Required	No
	DB Column	BenefitFamily.PreferredAppointmentTimeCd
Family Preferences - Column	This is a listing of all columns in upcoming Master Schedules for the clinic in which the family is served.	
	Type	List Box
	Required	No
	DB Column	BenefitFamily.PreferredStaffPerson
	Code ID	MasterSchedule table lookup (DisplayText + Stfp_ID)
Family Preferences - Day of Week	This is a listing of the days of the week.	
	Type	List Box
	Required	No
	DB Column	BenefitFamily.PreferredAppointmentDayCd
	Code ID	Day of Week This code element is non-editable. The installed values are: Monday Tuesday Wednesday Thursday Friday Saturday Sunday
OK	The OK button saves the changes to the family preferences and closes the Family Preferences pop-up screen.	
	Type	Command Button
	Hot Key	Alt + O
Cancel	The Cancel button does not save any changes to the family preferences and closes the Family Preferences pop-up screen.	
	Type	Command Button
	Hot Key	Alt + L

Business Rules

1.

Developer Notes

1.

3.3 WIC Appointment Reminder

The WIC Appointment Reminder is generally printed when an appointment is made or rescheduled, or when an appointment is in the near future. This reminder is sometimes handed directly to the endorser/participant and is sometimes mailed to the family. The appointment reminder is in letter format and is available in English and in Spanish. The system fills in the date and time of the appointment, which participants have appointments, and what those appointments are for. The WIC Appointment Reminder is specific to a single family WIC appointment, not all future WIC appointments. There is a listing of items to bring to the appointment. The list of items is configurable in System Administration. Users manually check off any items that should be brought to the appointment. The reminder also provides the clinic name, address, and phone number.

3.3.1 Language: English and Spanish

The WIC Appointment Reminder is available in both English and Spanish.

3.3.2 WIC Appointment Reminder Mockup

WIC Program

WIC Appointment Reminder

Stephanie Dill
2802 Hull Ave
Dennis, CO 55555

Dear Stephanie,

This is a reminder of the WIC appointments for the following members of your family:

Date	Time	Participant Name	Appt Type
Tue Aug 28, 2007	11:45 AM	Stephanie Dill	Certification

Please bring the following with you:

____ Proof of current income
*Paycheck stubs, income tax return, etc. OR Proof of current eligibility for
Medicaid, Food Stamps, or TANF*

____ Proof of your address (one of the following):
*Utility bill
Rent or mortgage receipt*

Drivers License with current address
Voter registration card with current address

____ Proof of identity for each family member applying for WIC such as:

Drivers' license or passport
Birth certificate
Insurance or Medicaid card
School or work ID
Hospital/medical record
Crib card
WIC ID folder from any state
Social Security card

____ Hemoglobin or hematocrit results, height and weight (if available)

____ Immunization record for children 2 years and younger

____ Your children (list names): _____

____ Your EBT card

If you are unable to keep this appointment, please call us at (555) 444-5555 as soon as possible so that we can reschedule your appointment.

River Bend WIC Agency
 123 Rose Drive
 Bach, WY 66556
 (555) 444-5555

USDA is an equal opportunity provider

Business Rules

1. Display a warning message if Do Not Send is currently marked on the family contact/address screen and the WIC Appointment Reminder is selected for printing. Users must confirm that they want to go ahead and print the Appointment Notice. For further information on the Contact/Address screen see the CS Family Intake Screens DFDD.
2. For return address, use <Endorser name> and <family address>.
 - a. The endorser name is
 FamilyMember.FirstName+FamilyMember.MiddleName+FamilyMember.LastN
 ame where FamilyMember.ParentGuardianIn = "Y"
 - b. The family address is
 FamilyAddress.StreetAddrLine1+
 FamilyAddress.StreetAddrLine2+
 FamilyAddress.Apartment+ FamilyAddress.POBox+

Business Rules

- FamilyAddress.City+ FamilyAddress.State+ FamilyAddress.ZipCode+ FamilyAddress.ZipPlus4).
3. Do not allow space in the printed address for data elements that do not exist in the family record.
 4. For Salutation, use the first name of the <Endorser>.
 - a. The endorser first name is (FamilyMember.FirstName where FamilyMember.ParentGuardian.In = "Y").
 5. In grid, only include participants in the family with appointment types marked in this WIC appointment.
 - a. Date = Appointment.StartTime
 - b. Time = Appointment.StartTime
 - c. Participant Name = AppointmentParticipant.Part_ID
 - d. Appt Type = AppointmentParticipant.WICApptTypeCd
 - e. Order grid by Participant Last Name and then Participant First Name if multiple participants.
 6. Phone number in the narrative is for the Local Agency (LocalAgency.BusinessAreaCode+ LocalAgency.BusinessPhoneNr)
 7. The final Name and Address is <agency name>, <address> and <phone number>.
 - a. The agency name is LocalAgency.Name.
 - b. The address is
 LocalAgency.StreetAddrLine1
 LocalAgency.StreedAddrLine2
 LocalAgency.Suite, LocalAgency.POBox
 LocalAgency.City, LocalAgency.State LocalAgency.ZipCode+ LocalAgency.ZipPlus4
 - c. The phone number is LocalAgency.BusinessAreaCode+ LocalAgency.BusinessPhoneNr
 8. Do not allow space in the printed agency address for data elements that do not exist in the agency record.
 9. The clinic services breastfeeding message image appears in the footer-middle of the output.
 10. The clinic services header image appears in the header-left of the output.
 11. Page numbering in the output should appear in the footer-right in the format "Page x of y".
 12. This UI output is portrait.

Developer Notes

- 1.

3.4 Notice of Missed Appointment

The Notice of Missed Appointment is printed when participants do not attend a scheduled WIC appointment. The notice is mailed to the endorser with a request to call the WIC office to reschedule the appointment.

3.4.1 Language: English and Spanish

The notice of missed appointment is available in both English and Spanish.

3.4.2 Notice of Missed Appointment Mockup

WIC Program

Notice of Missed Appointment

Stephanie Dill
2802 Hull Ave
Dennis, CO 55555

Dear Stephanie,

This is a reminder that the following members of your family recently missed a scheduled WIC appointment on Tuesday August 28, 2007 11:45 AM at River City.

This missed appointment was for the following members of your family:

Date	Time	Participant Name	Appt Type
Tue Aug 28, 2007	11:45 AM	Stephanie Dill	Certification

Please call us at (555) 444-4545 as soon as possible so that we can reschedule you to a more convenient day or time.

River Bend WIC Agency
123 Rose Drive
Bach, WY 66556
(555) 444-4545

USDA is an equal opportunity provider

Business Rules

1. Display a warning message if Do Not Send is currently marked on the family contact/address screen and the WIC Appointment Reminder is selected for printing. Users must confirm that they want to go ahead and print the Appointment Notice. For further information on the Contact/Address screen see the CS Family Intake Screens DFDD.
2. For return address, use <Endorser name> and <family address>.
 - a. The endorser name is
FamilyMember.FirstName+FamilyMember.MiddleName+FamilyMember.LastName where FamilyMember.ParentGuardianIn = "Y"
 - b. The family address is
FamilyAddress.StreetAddrLine1+
FamilyAddress.StreetAddrLine2+
FamilyAddress.Apartment+ FamilyAddress.POBox+
FamilyAddress.City+ FamilyAddress.State+ FamilyAddress.ZipCode+
FamilyAddress.ZipPlus4).
3. Do not allow space in the printed address for data elements that do not exist in the family record.
4. For Salutation, use the first name of the <Endorser>.
 - a. The endorser first name is (FamilyMember.FirstName where FamilyMember.ParentGuardian.In = "Y").
5. For day, date, time and location in the narrative, use the following:
 - a. day, date, time = Appointment.StartTime
 - b. location = Clinic.Name
6. In grid, only include participants with appointment types marked in this WIC appointment.
 - a. Date = Appointment.StartTime
 - b. Time = Appointment.StartTime
 - c. Participant Name = AppointmentParticipant.Part_ID
 - d. Appt Type = AppointmentParticipant.WICApptTypeCd
7. Phone number in the narrative is for the Local Agency (
LocalAgency.BusinessAreaCode+ LocalAgency.BusinessPhoneNr)
8. The final Name and Address is <agency name>, <address> and <phone number>.
 - a. The agency name is LocalAgency.Name.
 - b. The address is
LocalAgency.StreetAddrLine1
LocalAgency.StreedAddrLine2
LocalAgency.Suite, LocalAgency.POBox
LocalAgency.City, LocalAgency.State LocalAgency.ZipCode+
LocalAgency.ZipPlus4
 - c. The phone number is LocalAgency.BusinessAreaCode+
LocalAgency.BusinessPhoneNr
9. Do not allow space in the printed agency address for data elements that do not exist in the agency record.

Business Rules

10. The clinic services breastfeeding message image appears in the footer-middle of the output.
11. The clinic services header image appears in the header-left of the output.
12. Page numbering in the output should appear in the footer-right in the format "Page x of y".
13. This UI output is portrait.

4 Nutrition Education Class

The Nutrition Education class pop-up allows the user to set up a nutrition education class for a group of participants.

Nutrition Education Class Pop-Up

Nutrition Education Class

*Class Title

Breastfeeding Basics

*Column Name(s)

Nutrition Ed

*Date

7/30/2007

Appointment Type

☒ Nutrition Ed Class

*Start Time

08:45 AM

*End Time

09:00 AM

15 minutes

*Original Max Count

15

*Current Max Count

15

Scheduled Count:

2

Overbook Reason

Education Provider

☒ Staff Member

Lucy L. Meidinger

☐ Organization

Notes

*NE Topics

Breastfeeding, Breastfeeding Basics

Participants

Add Recent Family

Find Family

Family ID Search

Retrieve Family

Add Row

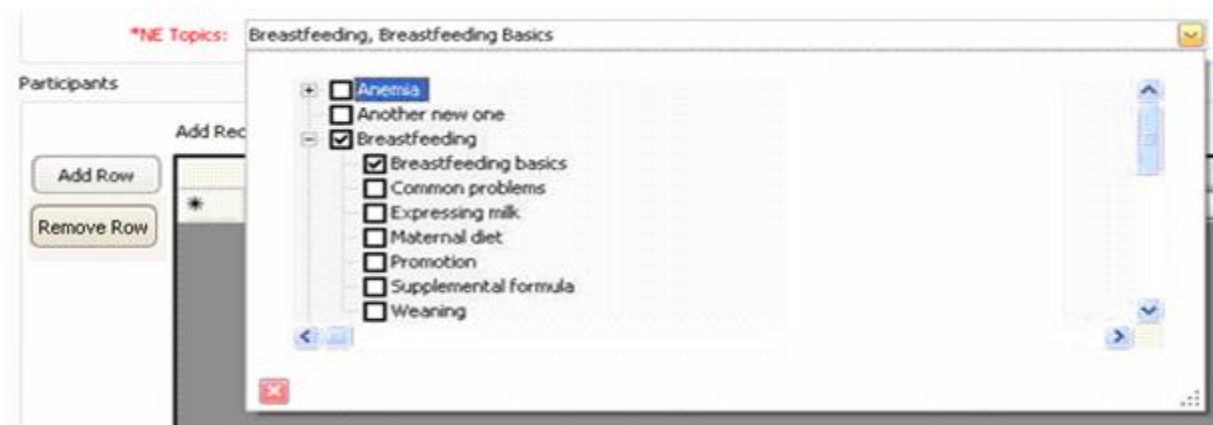
Remove Row

Family ID	Name	Phone #	Category	Status
12345	Dill, Stephanie	(123) 456-7890	Breastfeeding	Attended
54321	Tilley, Jennifer	(098) 765-4321	Breastfeeding	Attended
▶*				

OK

Cancel

Delete

Nutrition Education Class Pop-Up with the NE Topics List Box Open

Control	Description			
Class Title	This is the title of the class offered. The class titles are defined in the SA Clinic Services DFDD.			
	Type	List Box		
	Required	Yes		
	DB Column	NutritionEdClass.Name		
	Code ID	NutritionEdClass table lookup (Name field)		
Date	This is the date the class will be or was held. The default is the current date.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	Appointment.StartTime		
Start Time	This is the time the class begins. Start times can be adjusted in increments of 5 minutes.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.StartTime		

Control	Description			
End Time	This is the time the class ends. End times can be adjusted in increments of 5 minutes.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.EndTime		
Unlabeled (next to End Time)	This is the appointment duration, that is, the difference between the start and end times for the appointment. The text is red if the appointment duration is less than the needed duration.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 99 minutes		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Original Max Count	This is the maximum number of endorsers that could be scheduled for the class when it was created. (The system uses the assumption that there is one endorser for each Family ID.) Upon save, this number becomes display-only. This number populates the Current Max Count.			
	Type	Text Box		
	Required	Yes		
	Length	3		
	Validation	Numeric		
	Display Only	No on creation of appointment, Yes after Save	Calculated	No
	DB Column	Appointment.MaxStudentNr		

Control	Description			
Current Max Count	This is the current maximum number of endorsers that can be scheduled for the class. (The system uses the assumption that there is one endorser for each Family ID.) This number can be more or less than the Original Max Count. This number can be changed as the class date draws near and staffing or space issues dictate a change from the original maximum count. This is the number that is displayed for the hover text and used in business rules related to the count.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 2		
	Validation	Numeric, Mask of 99		
	Display Only	No	Calculated	No
	DB Column	Appointment.UpdatedMaxStudentNr		
Scheduled Count	This is the total number of endorsers currently scheduled for this class. (The system uses the assumption that there is one endorser for each Family ID.)			
	Type	Text Box		
	Required	No		
	Length	2		
	Validation	Mask of 99		
	Display Only	Yes	Calculated	Yes
	DB Column	Appointment.BFam_ID		
Overbook Reason	This is a free form text box which allows users to record the reason for overbooking the class. Clicking on the down arrow opens up a larger area for typing.			
	Type	Text Box		
	Required	Yes, if the class is overbooked		
	Length	60		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Appointment.OverBookReason		
Education Provider – Staff Member	This indicates the staff member who provides the education.			
	Type	Radio Button		
	Required	No		
	DB Column	NA		

Control	Description			
Education Provider - Staff Member	This is the list of staff member names from which to choose the appropriate staff member that will provide the education. This list includes all staff with user access to this agency.			
	Type	List Box		
	Required	Yes, when Staff Member radio button is selected		
	DB Column	Appointment.Stfp_ID		
	Code ID	Appointment table lookup (Stfp_ID field)		
Education Provider - Organization	This indicates that a particular organization provides the education.			
	Type	Radio Button		
	Required	No		
	DB Column	NA		
Education Provider - Organization	This is the list of organization names from which to choose the appropriate organization that provided the education. This list is from the Organizations for the agency.			
	Type	List Box		
	Required	Yes, when Organization radio button is selected		
	DB Column	Appointment.Org_ID		
	Code ID	Appointment table (Org_ID field)		
Notes	This is a free form text box which allows users to record comments about the appointment. Clicking on the down arrow opens up a larger area for typing. Special Needs text recorded on the Family Member screen in Clinic Services is automatically copied into the Notes.			
	Type	Multi Line Text Box		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	Appointment.Note		
NE Topics	The Nutrition Education Topics control is used to set up the specific topics that will be covered during the nutrition education class. Clicking on the down arrow in the NE Topics list box drops down a window that contains a list of all selected and available nutrition education topics. The user selects the topics to cover during the class by clicking a check box. As many topics as possible are then displayed in the NE Topics text box.			
	Type	List Box		
	Required	Yes		
	DB Column	AppointmentNutritionalTopic.ID		

Control	Description			
	Code ID	NutritionEdClass table lookup		
Column Name(s)	This is the designated name(s) for the column(s) associated with the class. The column names are created on the Master Schedule screen in System Administration. The column name may be a specific staff member’s name, a general heading such as CPA, or an intelligent column name like Nutr. Ed Class. Clicking on the down arrow opens a listing of column names. The user can check multiple check boxes to put this appointment in more than one column.			
	Type	Text Box		
	Required	Yes		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	AppointmentColumn.MSC_ID		
Appointment Type	This is the type of the appointment. For the Nutrition Education Class pop-up this is always filtered to “Nutrition Education Class” and cannot be changed.			
	Type	List Box		
	Required	Yes		
	DB Column	Appointment.AppointmentTypeCd		
	Code ID	Appointment Type		

Control	Description			
Participants - Add Recent Family	The Add Recent Family list box allows the user to display a list of recent families that have been opened by the user in Clinic Services. The name of the Endorser is displayed in the list. The user then selects a recent family and all active participants in the family are dropped into the nutrition education class. The staff member can then remove any participants that should not be in this class.			
	Type	List box		
	Required	No		
	DB Column	NA		
	Code ID	NA – List of recently viewed families is held in memory		
Participants - Find Family	The Find Family button opens the search pop-up, allowing the user to search for the family that they want to schedule an appointment for. If they select a family and press the OK button, all active participants in the family are dropped into the nutrition education class. The staff member can then remove any participants that should not be in this class. See Searching for Families for additional information.			
	Type	Command Button		
	Hot Key	Alt + I		
Participants - Family ID Search	The Family ID Search text box allows the user to enter the ID of a family that they want to schedule the appointment for. When they press the Retrieve Family button the family's information is retrieved and all active participants in the family are dropped into the nutrition education class. If the ID is invalid, an error is displayed. If the user does not know the family's ID, then they should use the Find Family button.			
	Type	Text Box		
	Required	No		
	Length	9		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	Appointment.BFam_ID		

Control	Description			
Participants - Retrieve Family	The Retrieve Family button retrieves family information for the family ID entered into the Family ID Search text box and all active participants in the family are dropped into the nutrition education class. If the ID is invalid, an error is displayed.			
	Type	Command Button		
	Hot Key	Alt + V		
Participants	The Participants grid is used to enter the names of the participants who are scheduled to attend the nutrition education class, mark the status as Attended, Not Attended, or Refused.			
	Type	Data Grid		
	Display	No		
Participants - Add Row	This button opens the participant search pop-up. See Searching for Participants for additional information.			
	Type	Command Button		
	Hot Key	Alt + A		
Participants – Remove Row	This button removes the selected participant on the data grid.			
	Type	Command Button		
	Hot Key	Alt + R		
Participants - Family ID	This is the Family ID of the participant. Clicking on the ID closes the Nutrition Education Class pop-up and takes the user to the Family screen in Clinic Services.			
	Type	Link		
Participants - Name	This is the Name of the participant.			
	Type	Text Box		
	Required	Yes		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	FamilyMember.FirstName, FamilyMember.MiddleName, FamilyMener.LastName		

Control	Description			
Participants - Phone #	This is the phone number of the family.			
	Type	Text Box		
	Required	Yes		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	BenefitFamily.HomePhoneAreaCd + BenefitFamily.HomePhoneNr		
Participants - Category	This is the participant's category.			
	Type	Text Box		
	Required	Yes, auto-filled based on Participant.		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	ParticipantType.ParticipantTypeCD		
Participants - Status	This status column allows the user to indicate whether or not the participant attended the class or if nutrition education was refused.			
	Type	List Box		
	Required	Yes, before benefits can be produced		
	DB Column	AppointmentParticipant.AppointmentStatusCd		
	Code ID	NtrEdAppStatus This code element is non-editable. The installed values are: Attended Not Attended Refused		
OK	For a new class, the OK button saves the class to the clinic schedule. For an existing class, the OK button saves any changes to the class.			
	Type	Command Button		
	Hot Key	Alt + O		

Control	Description	
Cancel	For a new class, the Cancel button closes the pop-up without saving the class to the schedule. For an existing class, the Cancel button closes the pop-up and abandons the changes to the class.	
	Type	Command Button
	Hot Key	Alt + L
Delete	The Delete button allows the user to delete the Nutrition Ed Class from the clinic schedule.	
	Type	Command Button
	Hot Key	None

Business Rules

General Business Rules

1. When a new Nutrition Education Class Appointment is created, Education Provider and Organization radio buttons are blank by default.
2. Display error message if the date of the Nutrition Education Class is being changed and there is at least one participant scheduled in the class.
3. Display error message if user attempts to delete a Nutrition Education Class while there are participants assigned to the class.
4. If a Nutrition Education Class is in the past, then disable the ability to change the date of the class.
5. The Staff Member or Organization selected for the appointment displays on the Nutrition Education screen when the class is recorded as completed nutrition education.
6. The Staff Member or Organization list boxes are only enabled if the associated radio button is selected.
7. Display a warning if the user tries to save the appointment and the number of participants is greater than the Current Max Count.
8. When overbooking a class, display a pop-up message which says "This class is full. Do you want to continue?" with Yes and No buttons. If they select Yes, make the overbook reason on the pop-up required.
9. Update Scheduled Count as participants are added to the class by decrementing number of slots based on each family that is added.
10. If the appointment status is set to Cancelled, capture a cancelled reason.
11. As participants are added or removed, update the Scheduled Count. The scheduled count is the number of endorser (assume 1 endorser per family ID).
12. Display a confirmation warning message before allowing a row to be deleted.
13. Display a confirmation warning message before allowing a delete of the Nutrition Education Class.
14. Display a warning message if marking a participant status 1-7 days after the appointment date.
15. Display an error message if trying to mark a participant status >7 days after the appointment date.

Business Rules**NE Topics List Box Rules**

16. Include a red X close button to close the NE Topics drop-down list.
17. Allow scrolling within the topics list.
18. Group topics by category of nutrition education topic and display categories in alphabetical order.
19. Nutrition education topics come from the database column AppointmentNutritionalSubTopic.ID.
20. Display an error if attempting to save a nutrition education class without at least one nutrition education topic.
21. The user may select a high level topic by checking the check box. All sub-topics under the high level topic are automatically selected. The user may also choose to deselect some of the sub-topics.
22. If a user selects a sub-topic, the high level topic is automatically checked.

Participants Grid Rules

23. If the participant is marked as "Attended", benefits for the family can be produced.
24. If the participant is marked as "Attended," when OK is clicked, a new Nutrition Education record is created with today's date and the Nutrition Education topics from the Nutrition Education Class are marked on the participant's nutrition education record as Nutrition Education Topics Covered.
25. If the participant is marked as "Refused", benefits for the family can be produced.
26. If the participant is marked as "Refused", when OK is clicked, a new Nutrition Education record is created with today's date and Refused Nutrition Education Class checkbox is checked. No nutrition education topics are recorded. Note: Refused is also displayed for Nutrition Education Topics on the Visit Summary for that day.
27. Allow one or more participants at a time to be cut from the participant list and pasted into the participant list on another Nutrition Education Class.

Developer Notes

1. When a family is selected, pull the Special Needs text recorded on the Family Member screen in Clinic Services into the Notes – preface with the Family ID.
2. When a participant with an associated Special Needs text is removed from the grid, remove the Special Needs text from the Notes field.
3. Make the Family ID in the Participants grid a link. Clicking on it closes the pop-up and takes the user to the Family screen in Clinic Services.

4.1 Searching for Participants

The clinic services search screen is used to search for participants to add to the nutrition education class. The search pop-up screen is accessed by clicking the Add Row button on the WIC Scheduler – Nutrition Education Class screen. After selecting participants in the search results, the selected participants are placed into the Participants section of the WIC Appointment Pop-up. The same clinic services screen is described in the CS 2 Activity Screens DFDD. See the section on Retrieve Participants in that DFDD.

4.2 Nutrition Education Class Roster

The Nutrition Education Class Roster lists the class title, date, time, staff resources, maximum number of students and class participants. This roster can be printed out and used by staff while conducting the nutrition education class.

4.2.1 Language: English

The nutrition education class roster is available in English only.

4.2.2 Nutrition Education Class Roster Mockup

Nutrition Education Class Roster

31 – 1 River Plaza

Class Title: Picky eaters
Date: Tuesday July 24, 2007
Time: 10:20 AM
Staff Resource: A. Julie Mears
Max Count: 12
Current Count: 4

Class participants:

Family ID	Endorser Name	Participant Name	Category	Home Phone
12343	Molly Wheat	Caitlin Wheat	Child	(303) 555-1928
12343	Molly Wheat	Kyler Wheat	Child	(303) 555-9182
24332	Karla Com	Crystal Corn	Child	(303) 555-1611
33425	Betty Bear	Billy Bear	Child	Do Not Call
55432	Cindy Cane	Dylan Cane	Child	(303) 555-8877

Business Rules

1. Title Information, local agency/clinic = LocalAgency.FFLocalAgencyID, Clinic.ClnFFClinicID
2. Header Information
 - a. Class Title = NutritionEdClass.Name
 - b. Date = Appointment.StartTime
 - c. Time = Appointment.StartTime
 - d. Staff Resource = staff or organization assigned to the class, MasterScheduleColumn.DisplayText or
 - e. MasterScheduleColumn.Stfp_ID

Business Rules

- f. Max Count = current maximum count assigned for this nutrition education class. This is the total number of endorsers that can be accommodated in the class. (The assumption is that there is 1 endorser for a Family ID.) Appointment.UpdatedMaxStudentNr
 - g. Current Count = current count of endorsers (different Family ID numbers) scheduled in the class. Appointment.BFam_ID
- 3. Class Participants Information
 - a. Family ID = Appointment.BFam_ID
 - b. Endorser Name = FamilyMember.FirstName, FamilyMember.MiddleName, FamilyMember.LastName, FamilyMember.LastNameSuffix when ParentGuardianIn = Yes
 - c. Participant Name = FamilyMember.FirstName, FamilyMember.MiddleName, FamilyMember.LastName, FamilyMember.LastNameSuffix
 - d. Category = ParticipantType.ParticipantTypeCd
 - e. Home Phone = BenefitFamily.HomePhoneAreaCd + BenefitFamily.HomePhoneNr
 - f. If Do Not Call is indicated on the Contact/Address screen, then "Do Not Call" is listed on the output.
- 4. The primary sort of the table is by Family ID.
- 5. The clinic services breastfeeding message image appears in the footer-middle of the output.
- 6. The clinic services header image appears in the header-left of the output.
- 7. Page numbering in the output appears in the footer-right in the format "Page x of y".
- 8. This UI output is portrait.

4.3 Nutrition Education Class Appointment Reminder

The Nutrition Education Class Appointment Reminder for nutrition education classes is a pared down version of the individual appointment reminders. The class title, appointment date, time, and clinic location are provided. This appointment reminder is produced when the participant/endorser is present at the clinic and scheduling the class and is handed to them.

4.3.1 Language: English

The nutrition education class appointment reminder is available in English only.

4.3.2 Nutrition Education Class Appointment Reminder Mockup

WIC Program

Nutrition Education Class Appointment Reminder

Appt. Date and Time: Tuesday, August 28, 2007 11:45 AM

Clinic Address:

River Bend

123 Rose Plaza

River City, CO 44332

(555) 444-5585

You or a member of your family is scheduled to attend the following nutrition education class. The topics to be covered are listed below.

Picky Eaters

Topics

Toddler Diet

Hydration

If you are unable to keep this appointment, please call us at (555) 444-5585 as soon as possible so that we can reschedule you to a more convenient day or time.

Tri-County WIC Agency
 876 Row Circle
 Dennis, CO 44332
 (555) 444-5585

Business Rules

1. Display a warning message if Do Not Send is currently marked on the family contact/address screen and the WIC Appointment Reminder is selected for printing. Users must confirm that they want to go ahead and print the Appointment Notice. For further information on the Contact/Address screen see the CS Family Intake Screens DFDD.
2. Appt. Date and Time = Appointment.StartTime
3. For Clinic Address use: <clinic name>, <address>, and <phone number>.
 - h. The clinic name is Clinic.Name.
 - i. The address is
 - Clinic.PhysicalStreetAddrLine1
 - Clinic.PhysicalStreetAddrLine2
 - Clinic.PhysicalSuite, Clinic.PhysicalPOBox
 - Clinic.PhysicalCity, Clinic.PhysicalState Clinic.PhysicalZipCode+
 - Clinic.PhysicalZipPlus4
 - c. The phone number is
 - Clinic.BusinessAreaCode+Clinic.BusinessPhoneNr
4. Do not allow space in the printed clinic address for data elements that do not exist in the clinic record.
5. Class title = NutritionEdClass.Name
6. Topics = AppointmentNutritionalSubTopic.ID
7. Phone number in the narrative is for the Local Agency (
 - LocalAgency.BusinessAreaCode+ LocalAgency.BusinessPhoneNr)
8. The final Name and Address is <agency name>, <address> and <phone number>.
 - a. The agency name is LocalAgency.Name.
 - b. The address is
 - LocalAgency.StreetAddrLine1
 - LocalAgency.StreedAddrLine2
 - LocalAgency.Suite, LocalAgency.POBox
 - LocalAgency.City, LocalAgency.State LocalAgency.ZipCode+
 - LocalAgency.ZipPlus4
 - c. The phone number is LocalAgency.BusinessAreaCode+
 - LocalAgency.BusinessPhoneNr
9. Do not allow space in the printed agency address for data elements that do not exist in the agency record.
10. The clinic services breastfeeding message image appears in the footer-middle of the output.

Business Rules

11. The clinic services header image appears in the header-left of the output.
12. Page numbering in the output appears in the footer-right in the format "Page x of y".
13. This UI output is portrait.

5 Non-WIC Appointment

The Non-WIC Appointment pop-up allows the user to set up a non-WIC appointment. This appointment is not tied to a specific family record. This could be to block time for an immunization or dental screening activity that is being held at the WIC clinic. Staff can record names of people that will be utilizing this service or activity. Additionally, a Non-WIC appointment can be used to block out time for a staff member for a variety of reasons as dictated by their supervisor.



The image shows a screenshot of a software dialog box titled "Non-WIC Appointment". The dialog box has a blue title bar with a close button (X) in the top right corner. The main area contains several fields and controls:

- *Subject:** A text box containing "Immunizations".
- *Date:** A date picker showing "8/17/2007".
- *Start Time:** A time picker showing "11:15:00".
- *End Time:** A time picker showing "11:30:00", with a "15 minutes" duration indicator next to it.
- *Column Name(s):** A dropdown menu showing "Recertification".
- *Appointment Type:** A dropdown menu showing "Non-WIC Appointment" with a pink square icon.
- Allow Overbooks:** A checkbox that is checked.
- Notes:** A text area with a small dropdown arrow on the right.

At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Delete".

Control	Description			
Subject	This is the title of the Non-WIC Appointment.			
	Type	Text Box		
	Required	Yes		
	Length	200		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Appointment.Subject		
Date	This is the Date of the appointment, which defaults to current date.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	Appointment.StartTime		
Start Time	This is the Start Time of the appointment. Start times can be adjusted in increments of 5 minutes.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.StartTime		
End Time	This is the End Time and duration of the appointment. End times can be adjusted in increments of 5 minutes.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.EndTime		
Unlabeled (next to End Time)	This is the appointment duration, that is, the difference between the start and end times for the appointment.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 99 minutes		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		

Control	Description			
Column Name(s)	This is the designated name(s) for the column(s) associated with the appointment. The column names are created on the Master Schedule screen in System Administration. The column name may be a specific staff member’s name, a general heading such as CPA, or an intelligent column name like Nutr. Ed Class. Clicking on the down arrow opens a listing of column names. The user can check multiple check boxes to put this appointment in more than one column.			
	Type	Text Box		
	Required	Yes		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	AppointmentColumn.MSC_ID		
Appointment Type	This is the type of the appointment. For the Non-WIC Appointment pop-up this is always filtered to “Non-WIC Appointment” and cannot be changed.			
	Type	List Box		
	Required	Yes		
	DB Column	Appointment.AppointmentTypeCd		
	Code ID	AppointmentTypeCd This code element is editable but these installed values are non-editable: WIC Appointment Nutrition Education Class Non-WIC Appointment Personal Appointment		
Allow Overbooks	Checking this checkbox allows the appointment to be overbooked. If the checkbox is unchecked no other appointments can be created during the same time in the same column.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	Appointment.OverBookAllowIn		
Notes	Comments about the Non-WIC appointment.			
	Type	Multi Line Text Box		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	Appointment.Note		

Control	Description			
OK	For a new appointment, the OK button saves the appointment to the clinic schedule. For an existing appointment, the OK button saves any changes to the appointment.			
	Type	Command Button		
	Hot Key	Alt + O		
Cancel	For a new appointment, the Cancel button closes the appointment pop-up without saving the appointment to the schedule. For an existing appointment, the Cancel button closes the appointment pop-up and abandons the changes to the appointment.			
	Type	Command Button		
	Hot Key	Alt + L		
Delete	The Delete button allows the user to delete the appointment from the clinic schedule.			
	Type	Command Button		
	Hot Key	None		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the appointment record are displayed.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated	No
	DB Column	Appointment.ModifyStfpID Appointment.ModifyDt		

Business Rules

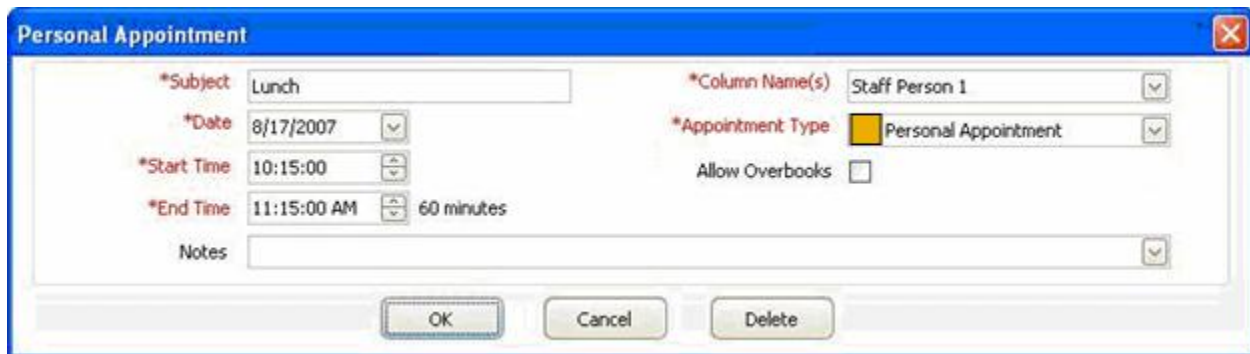
1. Display an error message if someone other than the staff person that created the appointment is trying to delete the appointment.
2. Display an error message if someone other than the staff person that created the appointment is trying to modify the Subject, Start Time or End Time of the appointment.
3. Any staff with access to the Non-WIC Appointment can modify the Notes field. (This is most likely to insert additional names of people that will utilize a service at the WIC clinic or to add additional information about an activity.)
4. Display an error message if the Non-WIC Appointment has "Allow Overbooks" unchecked and another appointment is being placed in the same column where this appointment already exists.
5. Display an error message if the Non-WIC Appointment has "Allow Overbooks" unchecked and it is being placed in a column where another appointment already exists. The other appointment must be moved before this appointment can be saved in that column.
6. Display a confirmation warning message to the staff person that created the appointment when they are trying to delete the appointment.

Developer Notes

1. The Title of the pop-up is the same as the Appointment Type.

6 Personal Appointment

The Personal Appointment pop-up allows the user to set up a personal type of appointment. This appointment is not tied to a specific family record. This could be for a staff member dentist appointment or to block out time for a staff member.



The screenshot shows a Windows-style dialog box titled "Personal Appointment". It contains the following fields and controls:

- *Subject:** A text box containing "Lunch".
- *Date:** A date picker showing "8/17/2007".
- *Start Time:** A time picker showing "10:15:00".
- *End Time:** A time picker showing "11:15:00 AM" with a "60 minutes" duration indicator.
- *Column Name(s):** A dropdown menu showing "Staff Person 1".
- *Appointment Type:** A dropdown menu showing "Personal Appointment" with a yellow square icon.
- Allow Overbooks:** An unchecked checkbox.
- Notes:** A text area with a small downward arrow icon on the right.
- Buttons:** "OK", "Cancel", and "Delete" buttons at the bottom.

Control	Description			
Subject	This is the title of the Personal Appointment.			
	Type	Text Box		
	Required	Yes		
	Length	200		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Appointment.Subject		
Date	This is the Date of the appointment, which defaults to current date.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	Appointment.StartTime		
Start Time	This is the Start Time of the appointment. Start times can be adjusted in increments of 5 minutes.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.StartTime		
End Time	This is the End Time and duration of the appointment. End times can be adjusted in increments of 5 minutes.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.EndTime		
Unlabeled (next to End Time)	This is the appointment duration, that is, the difference between the start and end times for the appointment.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 99 minutes		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		

Control	Description			
Column Name(s)	This is the designated name(s) for the column(s) associated with the appointment. The column names are created on the Master Schedule screen in System Administration. The column name may be a specific staff member’s name, a general heading such as CPA, or an intelligent column name like Nutr. Ed Class. Clicking on the down arrow opens a listing of column names. The user can check multiple check boxes to put this appointment in more than one column.			
	Type	Text Box		
	Required	Yes		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	AppointmentColumn.MSC_ID		
Appointment Type	This is the type of the appointment. For the Non-WIC Appointment pop-up this is always filtered to “Non-WIC Appointment” and cannot be changed.			
	Type	List Box		
	Required	Yes		
	DB Column	Appointment.AppointmentTypeCd		
	Code ID	AppointmentTypeCd This code element is editable but these installed values are non-editable: WIC Appointment Nutrition Education Class Non-WIC Appointment Personal Appointment		
Allow Overbooks	Checking this checkbox allows the appointment to be overbooked. If the checkbox is unchecked no other appointments can be created during the same time in the same column.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	Appointment.OverBookAllowIn		

Control	Description			
Notes	Comments about the Personal appointment.			
	Type	Text Box		
	Required	No		
	Length	500		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Appointment.Note		
OK	For a new appointment, the OK button saves the appointment to the clinic schedule. For an existing appointment, the OK button saves any changes to the appointment.			
	Type	Command Button		
	Hot Key	Alt + O		
Cancel	For a new appointment, the Cancel button closes the appointment pop-up without saving the appointment to the schedule. For an existing appointment, the Cancel button closes the appointment pop-up and abandons the changes to the appointment.			
	Type	Command Button		
	Hot Key	Alt + L		
Delete	The Delete button allows the user to delete the appointment from the clinic schedule.			
	Type	Command Button		
	Hot Key	None		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the appointment record are displayed.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated	No
	DB Column	Appointment.ModifyStfpID Appointment.ModifyDt		

Business Rules

1. Display an error message if the personal appointment is being modified or deleted by someone other than the staff person who created the appointment or the staff person to which the appointment was applied to their column (who the appointment was for).
2. Display an error message if the personal appointment has "Allow Overbooks" unchecked and another appointment is being placed in the same column where this appointment already exists.
3. Display an error message if the personal appointment has "Allow Overbooks" unchecked and it is being placed in a column where another appointment already exists. The other appointment must be moved before this appointment can be saved in that column.
4. Display a confirmation warning message to the staff person that created the appointment or to the staff person to which the appointment was applied when they are trying to delete the appointment.

Developer Notes

1. The Title of the pop-up is the same as the Appointment Type.

7 Income Guidelines Reference

The Income Guidelines Reference screen is used to determine if the family is eligible for the WIC program based on their current family income. If the system determines that the family is not eligible based on income, the user will not proceed to enter the family as a new family.

Tools > Income Guidelines Reference

The screenshot shows the 'Income Guidelines Reference' screen. On the left, there are three input fields: 'Total Income' (empty), 'Summary Period' (with 'Annually' selected and 'Monthly' unselected), and 'Household Size' (set to '5'). To the right is a table with two columns: 'Household Size' and 'Maximum Income'. The table lists values for household sizes from 1 to 10. The row for household size 5 is highlighted in green. At the bottom right of the table area is a 'Close' button.

Household Size	Maximum Income
1	\$18,130.00
2	\$24,420.00
3	\$30,710.00
4	\$37,000.00
5	\$43,290.00
6	\$49,580.00
7	\$55,870.00
8	\$62,160.00
9	\$68,450.00
10	\$74,740.00

Control	Description			
Total Income	This is the total income for the household.			
	Type	Text Box		
	Required	No		
	Length	Decimal 9,2		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	IncomeGuideline.Amount		
Household Size	This is the number of people in the household.			
	Type	Text Box		
	Required	No		
	Length	Integer 2		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	IncGuideline.FamilySizeQt		
Summary Period	This is the summary period for the income amount. Calculation display of the Maximum Income per Household Size is based on an Annually or Monthly selection.			
	Type	Radio Button		
	Required	No, default is Annually		
	DB Column	Not Stored		
Income Guideline	This is the display of the income guideline for the entered household size, summary period and maximum income amount.			
	Type	Read-only Data Grid		
	Display	Yes		
Grid Column Household Size	Each row displays the number of people in a household.			
	Format	Numeric	Calculated	No
Grid Column Maximum Income	Each row displays the maximum income per household size based on an annually or monthly calculation.			
	Format	Numeric, \$999,999.99	Calculated	Yes, if Monthly is selected
Close	This closes the Income Guidelines Reference pop-up.			
	Type	Command Button		
	Hot Key	Alt+C		

Business Rules

1. When accessing this screen, access the currently effective Income Guidelines defined in the SA Clinic Services DFDD to populate the grid. The Income Guidelines are in annual dollar amounts.
2. The summary period options are used to switch between an annual or monthly view of the maximum income amount per household size.
3. When "Monthly" is selected as the Summary Period, all effective Income Guideline dollar amounts are divided by 12 and displayed as whole dollar amounts.
4. Typing in the household size number highlights the corresponding income guideline row in the grid.

Developer Notes

1. When the user enters Household Size and Summary Period display the corresponding Income Guideline.
2. This is a view-only display of the income guidelines.
3. This information is not stored.

System Parameter	Purpose	Format
ClinicServices.IncomeHouseholdSizeError	The household size. Currently this is set to the integer pair max-15 min 1. The system produces an error message if a household size is <1, but not error is specified if it is greater than any value.	Integer Pair
ClinicServices.IncomeAnnualWarning	Identifies the maximum income amount for a family, above which eligibility is denied	Integer

8 Income Calculator

The Income Calculator allows a user to enter multiple weekly or hourly income amounts and have the application compute a monthly total.

Tools > Income Calculator

The clinic services income calculator is described in the clinic services CS 1 Family Intake Screens DFDD. See Income Calculator – Income by Weeks and Income Calculator – Income by Hours in that DFDD for detailed information about using the income calculator.

9 Find Open Appointment Slot

The Find Open Appointment Slot pop-up, accessed from the tool bar, allows the user to search for an open appointment slot based on certain search criteria within a designated date range.

Find Open Appointment Slot

Family ID: 34543 Endorser: Stephanie Lynn Dill

Criteria

Time of Day ☒ AM ☐ PM

Appointment Length

Day of Week

☒ Next Available ☐ After

Language

Column

Class Title

Search Results

Date Time	Column	Language	Day of Week	Class Title
<u>12/12/2007 10:00 AM</u>	Sp Nutr Ed	Spanish	Monday	BF Basics
<u>12/15/2007 11:00 AM</u>	Sp Nutr Ed	Spanish	Friday	BF Basics
<u>12/21/2007 9:00 AM</u>	Sp Nutr Ed	Spanish	Thursday	BF Basics

Control	Description			
Family ID	This is the Family ID of the selected recent family. If no recent family was selected, this is not displayed.			
	Type	Text Box		
	Required	Yes, if Recent Family selected		
	Length	9		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	BenefitFamily.FFFamilyID		
Endorser	This is the name of the Endorser for the family. If no recent family was selected, this is not displayed.			
	Type	Text Box		
	Required	Yes, if Recent Family selected		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	FamilyMember.FirstName, FamilyMember.MiddleName, FamilyMember.LastName		
Criteria - Time of Day - AM	This radio button allows morning appointments to be included in the search. By default, this button is selected if AM has been selected as a Family Preference.			
	Type	Radio Button		
	Required	No		
	DB Column	BenefitFamily.PreferredAppointmentTimeCd		
Criteria - Time of Day - PM	This radio button allows afternoon and evening appointments to be included in the search. By default, this button is selected if PM has been selected as a Family Preference.			
	Type	Radio Button		
	Required	No		
	DB Column	BenefitFamily.PreferredAppointmentTimeCd		

Control	Description			
Criteria – Appointment Length	This text box allows the user to enter an appointment length to include in the search. This value is in minutes.			
	Type	Text Box		
	Required	No		
	Length	2		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	Not Stored		
Criteria - Day of Week	This drop-down allows the user to select a specific day of the week to include in the search. By default, if a value has been selected as a Family Preference, it is auto-populated.			
	Type	List Box		
	Required	No		
	DB Column	BenefitFamily.PreferredAppointmentDayCd		
	Code ID	Day of Week This code element is non-editable. The installed values are: Monday Tuesday Wednesday Thursday Friday Saturday Sunday		
Criteria - Language	This drop-down allows the user to select a language to include in the search. Columns have an associated language. By default if a spoken language has been selected for the family, it is auto-populated.			
	Type	List Box		
	Required	No		
	DB Column	BenefitFamily.SpokenLanguageCd		
	Code ID	Spoken Language		

Control	Description			
Criteria - Column	This drop-down allows the user to select a column to include in the search. This list includes the names of any columns in the future for this clinic. By default, if a column has been selected as a Family Preference, it is auto-populated.			
	Type	List Box		
	Required	No		
	DB Column	BenefitFamily.PreferredStaffPerson		
	Code ID	MasterScheduleColumn table lookup (DisplayText +.Stfp_ID)		
Criteria - Class Title	This drop-down allows the user to select a specific nutrition education class title. All nutrition education class titles for this agency are included in the list.			
	Type	List Box		
	Required	No		
	DB Column	Not Stored		
	Code ID	NutritionEdClass table lookup		
Criteria - Next Available	This radio button allows the user to look for the next available appointment that matches the other search criteria.			
	Type	Radio Button		
	Required	Yes, this or After radio button must be selected		
	DB Column	Not Stored		
Criteria - After	This radio button allows the user to look for the next appointment after a specific date that matches the other search criteria. This is helpful as staff look to schedule appointments two to three months in the future.			
	Type	Radio Button		
	Required	Yes, this or Next Available radio button must be selected		
	DB Column	Not Stored		
Criteria - After	This date is the date after which the user wants to look for an open appointment.			
	Type	Date Picker		
	Required	Yes, if After radio button is selected		
	Display Only	No	Calculated	No
	DB Column	Not Stored		

Control	Description			
Criteria - Reset	Clicking the Reset button causes the current search criteria to be removed and reset to any default values so that another search may be started.			
	Type	Command Button		
	Hot Key	Alt + L		
Criteria - Clear	Clicking the Clear button causes all of the search criteria to be removed so that another search may be started.			
	Type	Command Button		
	Hot Key	Alt + L		
Criteria - Search	Clicking the Search button causes the search criteria to be evaluated and the appropriate search results are shown in the grid.			
	Type	Command Button		
	Hot Key	Alt + S		
Search Results	The Search Results grid shows the first 15 appointments that match the search criteria.			
	Type	Read-Only Data Grid		
	Display	Yes		
Date Time	This is the date and time for an appointment that meets the search criteria.			
	Format	Link, Formatted date and time, mm/dd/yyyy, 99:99 AM/PM	Calculated	No
Column	This is the column for an appointment that meets the search criteria.			
	Format	Alphanumeric	Calculated	No
Language	This is the language for an appointment that meets the search criteria.			
	Format	Alphanumeric	Calculated	No
Day of Week	This is the day of the week for an appointment that meets the search criteria.			
	Format	Alphanumeric	Calculated	No
Class Title	This is the class title for an appointment that meets the search criteria.			
	Format	Alphanumeric	Calculated	No

Control	Description	
Close	Clicking the Close button closes the pop-up window.	
	Type	Command Button
	Hot Key	Alt + C

Business Rules

1. When this pop-up is accessed or Reset, default search criteria to match any designated Family Preferences or preferred spoken language.
2. In Search Results, only return Nutrition Education Classes that are not yet at the maximum number of endorsers.
3. Return only the first 15 appointments that meet the search criteria.
4. Allow users to move directly to the appointment schedule using the link for the selected date/time. From there the user would make a new WIC appointment or add the participant to a nutrition education class.
5. If searching for a second time, use the last date for which appointment results were previously provided as the default date for the new search. This helps to provide the feel of Next Page, Next Page, Next Page instead of the user having to remember where to start each time.

Developer Notes

- 1.